

40101

# Utah Individual Income Tax Return

All State Income Tax Dollars Fund Education

**2011**  
**TC-40**

Fiscal year end month/year (mm/yy) -

Form 8886 filed

**Amended Return - enter code**

Your Soc. Sec. No.

X if deceased

Spouse's SSN

<b>1 Filing Status - enter code</b> 1 = Single • 2 = Married filing jointly 3 = Married filing separately 4 = Head of household 5 = Qualifying widow(er)	<b>• 2 Exemptions - enter number</b> a Yourself b Spouse c Dependents d <b>Total exemptions</b> (add a through c) <div style="display: inline-block; vertical-align: middle; margin-left: 10px;">           } from federal return         </div>	<b>3 Election Campaign Fund - enter code</b> C = Constitution Yourself Spouse D = Democratic • • L = Libertarian R = Republican Does not increase tax N = No contribution or reduce refund
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- |    |  |      |
|----|--|------|
| 4  | Federal adjusted gross income from federal return  | • 4  |
| 5  | Additions to income from TC-40A, Part 1 (attach TC-40A, page 1)  | • 5  |
| 6  | Total income - add lines 4 and 5   | 6    |
| 7  | State tax refund included on federal form 1040, line 10  | • 7  |
| 8  | Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1)   | • 8  |
| 9  | <b>Utah taxable income (loss)</b> - subtract the total of lines 7 and 8 from line 6  | • 9  |
| 10 | <b>Utah tax</b> - multiply line 9 by 5% (.05) (not less than zero)   | • 10 |
| 11 | Exemptions - multiply line 2d by \$2,775   | • 11 |
| 12 | Enter your <b>federal standard</b> or <b>itemized deductions</b>   | • 12 |
| 13 | Add lines 11 and 12  | 13   |
| 14 | State income tax deducted on federal Schedule A, line 5 (see instr.)   | • 14 |
| 15 | Subtract line 14 from line 13  | 15   |
| 16 | Multiply line 15 by 6% (.06)   | • 16 |
| 17 | Enter amount based on filing status: if line 1 equals 1 or 3, enter \$12,720;<br>if line 1 equals 4, enter \$19,080; if line 1 equals 2 or 5, enter \$25,440 | • 17 |
| 18 | Subtract line 17 from line 9 (not less than zero)  | 18   |
| 19 | Multiply line 18 by 1.3% (.013)  | • 19 |
| 20 | Taxpayer tax credit - subtract line 19 from line 16 (not less than zero)   | • 20 |
| 21 | If you are a qualified exempt taxpayer, enter "X" (complete worksheet)   | • 21 |
| 22 | <b>Utah income tax</b> - subtract line 20 from line 10 (not less than zero)  | • 22 |
| 23 | Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1)  | • 23 |
| 24 | Subtract line 23 from line 22 (not less than zero)   | 24   |

Non or Part-Year Residents, complete TC-40B before continuing on page 2

**Filing**  
**electronically**  
**is quick, easy and**  
**free, and will**  
**speed up your**  
**refund.**

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**go to**  
**taxexpress.**  
**utah.gov**

- 2 5 Enter tax (full-year resident enter tax from line 24; non or part-year resident enter tax from TC-40B, line 37) • 2 5
- 2 6 Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1) • 2 6
- 2 7 Subtract line 26 from line 25 (not less than zero) 2 7
- 2 8 Contributions - add lines 28a through 28d and enter total on line 28
- | Code | Description  | Code    | Amount | Sch Dist Code |
|------|--|---------|--------|---------------|
| 0 1  | Utah Nongame Wildlife Account                                | • 2 8 a |        |               |
| 0 2  | Pamela Atkinson Homeless Account                             | • 2 8 b |        |               |
| 0 3  | Kurt Oscarson Children's Organ Transplant Account            | • 2 8 c |        |               |
| 0 5  | School District & Nonprofit School District Foundation       | • 2 8 d |        | 2 8           |
| 0 9  | Cat & Dog Community Spay and Neuter Program                  |         |        |               |
| 1 0  | Methamphetamine Housing Reconstruction & Rehabilitation Fund |         |        |               |
| 1 1  | Canine Body Armor Account                                    |         |        |               |
- 2 9 AMENDED RETURN ONLY - previous refund • 2 9
- 3 0 Recapture of low-income housing credit • 3 0
- 3 1 Utah use tax • 3 1
- 3 2 **Total tax, use tax and additions to tax** - add lines 27 through 31 3 2
- 3 3 Utah income tax withheld shown on TC-40W, Part 1 (attach TC-40W, page 1) • 3 3
- 3 4 Credit for Utah income taxes prepaid from TC-546 and 2010 refund applied to 2011 • 3 4
- 3 5 Pass-through entity withholding tax shown on TC-40W, Part 3 (attach TC-40W, page 2) • 3 5
- 3 6 Mineral production withholding tax shown on TC-40W, Part 2 (attach TC-40W, page 2) • 3 6
- 3 7 AMENDED RETURN ONLY - previous payments • 3 7
- 3 8 Refundable credits from TC-40A, Part 5 (attach TC-40A, page 2) • 3 8
- 3 9 **Total withholding and refundable credits** - add lines 33 through 38 3 9
- 4 0 **TAX DUE** - subtract line 39 from line 32 (not less than zero) • 4 0
- 4 1 Penalty and interest 4 1
- 4 2 **PAY THIS AMOUNT** - add lines 40 and 41 • 4 2
- 4 3 **REFUND** - subtract line 32 from line 39 (not less than zero) • 4 3
- 4 4 Enter the amount of refund you want applied to your 2012 tax • 4 4
- 4 5 **DIRECT DEPOSIT YOUR REFUND** - provide account information
- Routing number • Account number
- Account type: • checking • savings
- Check box if refund will go to an account outside the United States (see instructions) •
- 4 6 To deposit total refund in your Utah Educational Savings Plan account(s), enter "X" (see instructions) • 4 6

Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules reflect my true tax status.

SIGN Your signature Date Spouse's signature Date

Third Party Designee	Name of designee (if any) you authorize to discuss this return	Designee's telephone number	Designee PIN
Paid Preparer's Section	Preparer's signature Date	Preparer's telephone number	Preparer's PTIN
	Firm's name and address		Preparer's EIN

**Part 1 - Additions to Income** (write the code and amount of each addition to income)

<u>Code</u>		<u>Code</u>		
5 1	Lump sum distribution	5 6	Child's income excluded from parent's return	•
5 3	Medical Savings Account (MSA) addback *	5 7	Municipal bond interest	•
5 4	Utah Educational Savings Plan (UESP) addback *	6 0	Untaxed income of a resident trust	
5 5	Reimbursed adoption expenses *	6 1	Untaxed income of a nonresident trust	•
		6 9	Equitable adjustments	•
	* to the extent previously deducted or credited on Utah return			•
				•

**Total additions to income** (add all additions to income and enter total here and on TC-40, line 5)

**Part 2 - Subtractions from Income** (write the code and amount of each subtraction from income)

<u>Code</u>		<u>Code</u>		
7 1	Interest from U.S. Government Obligations	7 8	Railroad retirement income	•
7 7	Native American income: Tribe	7 9	Equitable adjustments	
	Enrollment Number Code	8 2	Nonresident active duty military pay	•
	Your •	8 5	State tax refund distributed to beneficiary	
	Spouse's •	8 8	Nonresident military spouse income	•
				•
				•

**Total subtractions from income** (add all subtractions from income and enter total here and on TC-40, line 8)

**Part 3 - Apportionable Nonrefundable Credits** (write the code and amount of each credit)

<u>Code</u>		<u>Code</u>		
0 4	Capital gain transactions credit	2 2	Medical Care Savings Account (MSA) credit	•
1 8	Retirement tax credit (attach TC-40C)	2 3	Health benefit plan credit	
2 0	Utah Educational Savings Plan (UESP) credit	2 4	Qualifying solar project credit	•
				•
				•
				•

**Total apportionable nonrefundable credits** (add all Part 3 credits and enter total here and on TC-40, line 23)

**Part 4 - Nonapportionable Nonrefundable Credits** (write the code and amount of each credit)

<u>Code</u>		<u>Code</u>		
0 1	At-home parent credit	1 0	Recycling market dev. zone credit	•
0 2	Qualified sheltered workshop credit - name:	1 2	Research activities credit	
		1 3	Carryover of mach./equip. research credit	•
0 5	Clean fuel vehicle credit	1 7	Tax paid to another state (attach TC-40S)	
0 6	Historic preservation credit	1 9	Live organ donation expenses credit	•
0 7	Enterprise zone credit	2 1	Renewable residential energy systems credit	
0 8	Low-income housing credit	2 5	Combat related death credit	•
				•

**Total nonapportionable nonrefundable credits** (add all Part 4 credits and enter total here and on TC-40, line 26)

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**Part 5 - Refundable Credits** (write the code and amount of each refundable credit)

Code

Code

**3 9** Renewable commercial energy systems

**4 7** Agricultural off-highway gas/undyed diesel •

**4 0** Targeted business tax credit

**4 8** Farm operation hand tools •

**4 1** Special needs adoption credit •

•

•

•

•

**Total refundable credits** (add all refundable credits and enter total here and on TC-40, line 38)

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**Submit this page ONLY if data entered.**  
**Attach completed schedule to your 2011 Utah Income Tax return.**

**Residency Status:**

- **Nonresident.** Home state abbreviation: \_\_\_\_\_
- **Part-year resident** from: \_\_\_\_\_ to \_\_\_\_\_  
mm dd yy mm dd yy

<b>Income</b>		<b>Col. A - UTAH</b>	<b>Col. B - TOTAL</b>
1	Wages, salaries, tips, etc. (1040/1040A line 7, 1040EZ line 1)		
2	Taxable interest income (1040/1040A line 8a, 1040EZ line 2)		
3	Ordinary dividends (1040/1040A line 9a)		
4	Taxable refunds, credits, or offsets of state and local income taxes (1040 line 10)		
5	Alimony received (1040 line 11)		
6	Business income or (loss) (1040 line 12)		
7	Capital gain or (loss) (1040 line 13, 1040A line 10)		
8	Other gains or (losses) (1040 line 14)		
9	IRA distributions - taxable amount (1040 line 15b, 1040A line 11b)		
10	Pensions and annuities - taxable amount (1040 line 16b, 1040A line 12b)		
11	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (1040 line 17)		
12	Farm income or (loss) (1040 line 18)		
13	Unemployment compensation (1040 line 19, 1040A line 13, 1040EZ line 3)		
14	Social Security benefits - taxable amount (1040 line 20b, 1040A line 14b)		
15	Other income (1040 line 21)		
16	Additions to income from TC-40A, Part 1 (Utah portion only in Utah column)		
		-----	-----
17	Total income - add lines 1 through 16 for both columns A and B		

<b>Adjustments</b>		<b>Col. A - UTAH</b>	<b>Col. B - TOTAL</b>
18	Educator expenses - (1040 line 23, 1040A line 16)		
19	Certain business expenses (1040 line 24)		
20	Health savings account deduction (1040 line 25)		
21	Moving expenses (1040 line 26; enter in col. A only expenses moving into Utah)		
22	One-half of self-employment tax (1040 line 27)		
23	Self-employed SEP, SIMPLE and qualified plans (1040 line 28)		
24	Self-employed health insurance deduction (1040 line 29)		
25	Penalty on early withdrawal of savings (1040 line 30)		
26	Alimony paid (1040 line 31a)		
27	IRA deduction (1040 line 32, 1040A line 17)		
28	Student loan interest deduction (1040 line 33, 1040A line 18)		
29	Tuition and fees - (1040 line 34, 1040A line 19)		
30	Domestic production activities deduction (1040 line 35)		
31	State tax refund included on federal form 1040, line 10		
32	Subtractions from income from TC-40A, Part 2 (Utah portion only in Utah column)		
		-----	-----
33	Total adjustments - add lines 18 through 32 for both columns A and B		

34	Subtract line 33 from line 17 for both columns A and B (not less than zero)	•	•
Line 34, column B must equal TC-40, line 9			

**Non or Part-year Resident Utah Tax**

35	Divide line 34 column A by line 34 column B (to 4 decimal places). Do not enter a number greater than 1.0000.	35
36	Enter tax amount from TC-40, line 24	36
37	Multiply line 36 by the decimal on line 35. This is your Utah tax. Enter on TC-40, page 2, line 25	• 37

**Submit this page ONLY if data entered.**  
**Attach completed schedule to your 2011 Utah Income Tax return**

**Part 1 - Taxpayer Information**

You

Spouse

1 Date of birth - if born after 1952, you do not qualify for credit

•

•

mm dd yy

mm dd yy

**Part 2 - Age 65 or Over - Credit**

2 Enter "X" if you were age 65 or older by December 31, 2011

3 Enter total number of X's on line 2

4 Multiply the number on line 3 by \$450

**Part 3 - Under Age 65 - Retirement Income Credit**

5 Enter "X" if you were under age 65 and born before January 1, 1953

6 If you entered an "X" on line 5, enter \$288 in the same column

7 Enter total qualified retirement income for taxpayer checked on line 5

8 Multiply the amount on line 7 for each column by 6% (.06)

9 Enter the lesser of line 6 or line 8 for each column

10 Enter the total of line 9 for both columns

**Part 4 - Calculation of Credit**

11 Add lines 4 and 10

12 Enter total income from your TC-40, line 6

13 Enter nontaxable interest income (form 1040 or 1040A, line 8b) (see instr.)

14 Modified adjusted gross income (add lines 12 and 13)

15 Enter: \$16,000, if married filing separately  
\$25,000 if single  
\$32,000 if married filing jointly or qualifying widow(er)  
\$32,000 if head of household

}

16 Subtract line 15 from line 14 (not less than zero)

17 Multiply line 16 by 2.5% (.025)

18 Retirement Credit - subtract line 17 from line 11 (not less than zero)

Enter this amount on TC-40A, Part 3, using code 18

**Submit this page ONLY if data entered.**  
**Attach completed schedule to your 2011 Utah Income Tax return**

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**FIRST STATE**

- 1 Enter federal adjusted gross income taxed by both Utah and state of >
- 2 Federal adjusted gross income from TC-40, line 4
- 3 Divide line 1 by line 2; round to 4 decimal places. Do not enter a number greater than 1.0000.
- 4 Utah income tax from TC-40, line 22. Part-year residents, see instructions.
- 5 Credit limitation - multiply line 4 by decimal on line 3
- 6 Actual income tax paid to state shown on line 1.  
Part-year residents must prorate tax paid to other state. Credit only applies  
to the portion of actual taxes paid to the other state on income shown on line 1.
- 7 Credit for tax paid another state - lesser of line 5 or line 6

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**SECOND STATE**

- 1 Enter federal adjusted gross income taxed by both Utah and state of >
- 2 Federal adjusted gross income from TC-40, line 4
- 3 Divide line 1 by line 2; round to 4 decimal places. Do not enter a number greater than 1.0000.
- 4 Utah income tax from TC-40, line 22. Part-year residents, see instructions.
- 5 Credit limitation - multiply line 4 by decimal on line 3
- 6 Actual income tax paid to state shown on line 1.  
Part-year residents must prorate tax paid to other state. Credit only applies  
to the portion of actual taxes paid to the other state on income shown on line 1.
- 7 Credit for tax paid another state - lesser of line 5 or line 6

---

**THIRD STATE**

- 1 Enter federal adjusted gross income taxed by both Utah and state of >
  - 2 Federal adjusted gross income from TC-40, line 4
  - 3 Divide line 1 by line 2; round to 4 decimal places. Do not enter a number greater than 1.0000.
  - 4 Utah income tax from TC-40, line 22. Part-year residents, see instructions.
  - 5 Credit limitation - multiply line 4 by decimal on line 3
  - 6 Actual income tax paid to state shown on line 1.  
Part-year residents must prorate tax paid to other state. Credit only applies  
to the portion of actual taxes paid to the other state on income shown on line 1.
  - 7 Credit for tax paid another state - lesser of line 5 or line 6
- 

**Use additional forms TC-40S if claiming credits for more than three states**  
**Enter the total of all amounts shown on line 7 above on TC-40A, Part 4, using code 17**  
**Submit this page ONLY if data entered.**  
**Attach completed schedule to your 2011 Utah Income Tax return**

Line Explanations:	IMPORTANT
<p>1 Employer/payer ID number from W-2 box "b" or 1099</p> <p>2 Utah withholding ID number from W-2 box "15" or 1099 (14 characters, ending in WTH, no hyphens)</p> <p>3 Employer/payer name and address from W-2 box "c" or 1099</p> <p>4 Enter "X" if reporting Utah withholding from form 1099</p> <p>5 Employee's Social Security number from W-2 box "a" or 1099</p> <p>6 Utah wages or income from W-2 box "16" or 1099</p> <p>7 Utah withholding tax from W-2 box "17" or 1099</p>	<p><b>Do not send your W-2s or 1099s with your return.</b> Instead, enter W-2 or 1099 information below, but <b>only</b> if there is Utah withholding on the form.</p> <p>Use additional forms TC-40W if you have more than four W-2s and/or 1099s with Utah withholding tax.</p> <p>Enter mineral production withholding from TC-675R in Part 2 of TC-40W; enter pass-through entity withholding in Part 3 of TC-40W.</p>
<p>1</p> <p>2 &lt; 14 characters, no hyphens</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p>	<p>1</p> <p>2 &lt; 14 characters, no hyphens</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p>
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Enter total Utah withholding tax from all lines 7 here and on TC-40, page 2, line 33



**Part 2 - Utah Mineral Production Withholding Tax - TC-675R**

Do not send TC-675Rs or Utah Schedules K-1 with return. Enter TC-675R or Schedule K-1 information below. Use additional TC-40Ws if needed.

**Line Explanations:**

1	2	3	4	5
1	Producer's EIN from box "2" of TC-675R	4	Pass-through entity EIN if credit from partnership or S corporation (enter EIN from Utah Schedule K-1)	5
2	Producer's name from box "1" of TC-675R	5	Utah mineral production withholding tax from box "5" of TC-675R or from Utah Schedule K-1	
3	Producer's Utah withholding number from box "3" of TC-675R (14 characters, ending in WMP, no hyphens)			
1		1		
2		2		
3	< 14 characters, no hyphens	3	< 14 characters, no hyphens	
4		4		
5		5		
1		1		
2		2		
3	< 14 characters, no hyphens	3	< 14 characters, no hyphens	
4		4		
5		5		

Enter total mineral production withholding tax from all lines 5 here and on TC-40, page 2, line 36.

**Part 3 - Utah Pass-through Entity Taxpayer Withholding - Utah Schedule K-1**

Do not send Utah Schedule(s) K-1 with return. Enter information below. Use additional TC-40Ws if needed.

**Line Explanations:**

1	2	3
1	Pass-through entity EIN from Utah Schedule K-1 box "A"	2
2	Name of pass-through entity from Utah Schedule K-1 box "B"	3
3	Utah withholding tax paid by pass-through entity	
1		1
2		2
3		3
1		1
2		2
3		3

Enter total pass-through withholding tax from all lines 3 here and on TC-40, page 2, line 35.

Submit this page ONLY if data entered.

Attach this form to your 2011 Utah Income Tax Return. Do not attach withholding forms to your Utah return.

# Utah Individual Income Tax Return

All State Income Tax Dollars Fund Education

2011

TC-40

Fiscal year end month/year (mm/yy) - 99/99

Form 8886 filed X

Amended Return - enter code 9

Your Soc. Sec. No.

X if deceased

9999999999

FIRST-NAMEXXXXXXXX

LAST-NAMEXXXXXXXXXXXXXXXXXXXXXXXXXXXX

X

Spouse's SSN

9999999999

SPOUSE-NAMEXXXXXX

SPOUSE-LAST-NAMEXXXXXXXXXXXXXXXXXXXX

X

ADDRESSXXXXXXXXXXXXXXXXXXXXXXXXXXXX

PHONE99999

CITYXXXXXXXXXXXXXXXXXXXX

ST

ZIP999999

FOREIGN-COUNTRYXXXXXXXXXX

1 Filing Status - enter code

2 Exemptions - enter number

3 Election Campaign Fund - enter code

1 = Single

a 9 Yourself

C = Constitution

Yourself

Spouse

2 = Married filing jointly

b 9 Spouse

from federal return

D = Democratic

X

X

3 = Married filing separately

c 99 Dependents

L = Libertarian

4 = Head of household

d 99 Total exemptions (add a through c)

R = Republican

Does not increase tax

5 = Qualifying widow(er)

N = No contribution

or reduce refund

4 Federal adjusted gross income from federal return

4 9999999999

5 Additions to income from TC-40A, Part 1 (attach TC-40A, page 1)

5 9999999999

6 Total income - add lines 4 and 5

6 9999999999

7 State tax refund included on federal form 1040, line 10

7 9999999999

8 Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1)

8 9999999999

9 Utah taxable income (loss) - subtract the total of lines 7 and 8 from line 6

9 9999999999

10 Utah tax - multiply line 9 by 5% (.05) (not less than zero)

10 9999999999

11 Exemptions - multiply line 2d by \$2,775

11 9999999999

12 Enter your federal standard or itemized deductions

12 9999999999

13 Add lines 11 and 12

13 9999999999

14 State income tax deducted on federal Schedule A, line 5 (see instr.)

14 9999999999

15 Subtract line 14 from line 13

15 9999999999

16 Multiply line 15 by 6% (.06)

16 9999999999

17 Enter amount based on filing status: if line 1 equals 1 or 3, enter \$12,720;  
if line 1 equals 4, enter \$19,080; if line 1 equals 2 or 5, enter \$25,440

17 9999999999

18 Subtract line 17 from line 9 (not less than zero)

18 9999999999

19 Multiply line 18 by 1.3% (.013)

19 9999999999

20 Taxpayer tax credit - subtract line 19 from line 16 (not less than zero)

20 9999999999

21 If you are a qualified exempt taxpayer, enter "X" (complete worksheet)

21 X

22 Utah income tax - subtract line 20 from line 10 (not less than zero)

22 9999999999

23 Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1)

23 9999999999

24 Subtract line 23 from line 22 (not less than zero)

24 9999999999

Non or Part-Year Residents, complete TC-40B before continuing on page 2

Filing electronically is quick, easy and free, and will speed up your refund. To learn more, go to [taxexpress.utah.gov](http://taxexpress.utah.gov)

Utah Individual Income Tax Return (continued)												TC-40												Page 2																																															
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45												DIRECT DEPOSIT YOUR REFUND - provide account information												checking savings																																															
46												Routing number 9999999999												Account number 9999999999999999												Account type: X X																																			
47												Check box if refund will go to an account outside the United States (see instructions)												X																																															
48												To deposit total refund in your Utah Educational Savings Plan account(s), enter "X" (see instructions)												48 X																																															
49												Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules reflect my true tax status.																																																											
50												SIGN Your signature												Date												Spouse's signature												Date																							
51												HERE																																																											
52												Third Party												Name of designee (if any) you authorize to discuss this return												Designee's telephone number												Designee																							
53												Designee												NAMEXXXXXXXXXXXXXXXXXXXXXXXXXXXX												9999999999												PIN												999999											
54												Preparer's signature												Date												Preparer's telephone number												Preparer's																							
55												Paid																								9999999999												PTIN												9999999999											
56												Preparer's												FIRM NAMEXXXXXXXXXXXXXXXXXXXXXXXXXXXX																								Preparer's																							
57												Section												ADDRESSXXXXXXXXXXXXXXXXXXXXXXXXXXXX																								EIN												9999999999											
58																								CITYXXXXXXXXXXXXXXXXXXXX ST												9999999999																																			

Income Tax Supplemental Schedule												TC-40A												Page 1											
40103												SSN 999-99-9999												2011											
Part 1 - Additions to Income (write the code and amount of each addition to income)																																			
Code												Code																							
51 Lump sum distribution												56 Child's income excluded from parent's return												• 99 9999999999999999											
53 Medical Savings Account (MSA) addback *												57 Municipal bond interest												• 99 9999999999999999											
54 Utah Educational Savings Plan (UESP) addback *												60 Untaxed income of a resident trust																							
55 Reimbursed adoption expenses *												61 Untaxed income of a nonresident trust												• 99 9999999999999999											
												69 Equitable adjustments																							
* to the extent previously deducted or credited on Utah return																								• 99 9999999999999999											
																								• 99 9999999999999999											
Total additions to income (add all additions to income and enter total here and on TC-40, line 5)																								9999999999999999											
Part 2 - Subtractions from Income (write the code and amount of each subtraction from income)																																			
Code												Code																							
71 Interest from U.S. Government Obligations												78 Railroad retirement income												• 99 9999999999999999											
77 Native American income: Tribe												79 Equitable adjustments																							
Enrollment Number Code												82 Nonresident active duty military pay												• 99 9999999999999999											
												85 State tax refund distributed to beneficiary																							
Your • 9999999999999999												88 Nonresident military spouse income												• 99 9999999999999999											
Spouse's • 9999999999999999																								• 99 9999999999999999											
																								• 99 9999999999999999											
Total subtractions from income (add all subtractions from income and enter total here and on TC-40, line 8)																								9999999999999999											
Part 3 - Apportionable Nonrefundable Credits (write the code and amount of each credit)																																			
Code												Code																							
04 Capital gain transactions credit												22 Medical Care Savings Account (MSA) credit												• 99 9999999999999999											
18 Retirement tax credit (attach TC-40C)												23 Health benefit plan credit																							
20 Utah Educational Savings Plan (UESP) credit												24 Qualifying solar project credit												• 99 9999999999999999											
																								• 99 9999999999999999											
																								• 99 9999999999999999											
																								• 99 9999999999999999											
Total apportionable nonrefundable credits (add all Part 3 credits and enter total here and on TC-40, line 23)																								9999999999999999											
Part 4 - Nonapportionable Nonrefundable Credits (write the code and amount of each credit)																																			
Code												Code																							
01 At-home parent credit												10 Recycling market dev. zone credit												• 99 9999999999999999											
02 Qualified sheltered workshop credit - name:												12 Research activities credit																							
XXXXXXXXXXXXXXXXXXXXXXXXXXXX												13 Carryover of mach./equip. research credit												• 99 9999999999999999											
05 Clean fuel vehicle credit												17 Tax paid to another state (attach TC-40S)																							
06 Historic preservation credit												19 Live organ donation expenses credit												• 99 9999999999999999											
07 Enterprise zone credit												21 Renewable residential energy systems credit																							
08 Low-income housing credit												25 Combat related death credit												• 99 9999999999999999											
																								• 99 9999999999999999											
Total nonapportionable nonrefundable credits (add all Part 4 credits and enter total here and on TC-40, line 26)																								9999999999999999											
Submit this page ONLY if data entered.																																			
Attach completed schedule to your 2011 Utah Income Tax return.																																			

Income Tax Supplemental Schedule (continued)												TC-40A												Page 2	
40104												SSN 999-99-9999												2011	
Part 5 - Refundable Credits (write the code and amount of each refundable credit)																									
Code													Code												
39 Renewable commercial energy systems													47 Agricultural off-highway gas/undyed diesel • 99 9999999999999999												
40 Targeted business tax credit													48 Farm operation hand tools • 99 9999999999999999												
41 Special needs adoption credit													• 99 9999999999999999												
													• 99 9999999999999999												
													• 99 9999999999999999												
													• 99 9999999999999999												
													• 99 9999999999999999												
													• 99 9999999999999999												
Total refundable credits (add all refundable credits and enter total here and on TC-40, line 38)													9999999999999999												
Submit this page ONLY if data entered.																									
Attach completed schedule to your 2011 Utah Income Tax return.																									

Non and Part-year Resident Schedule		TC-40B 2011
40105 SSN 999-99-9999		
<b>Residency Status:</b>		
<input checked="" type="checkbox"/> <b>Nonresident.</b> Home state abbreviation: <b>XX</b> <input checked="" type="checkbox"/> <b>Part-year resident from:</b> 99/99/99 to 99/99/99		
<b>Income</b>		<b>Col. A - UTAH</b>
		<b>Col. B - TOTAL</b>
1	Wages, salaries, tips, etc. (1040/1040A line 7, 1040EZ line 1)	9999999999.
2	Taxable interest income (1040/1040A line 8a, 1040EZ line 2)	9999999999.
3	Ordinary dividends (1040/1040A line 9a)	9999999999.
4	Taxable refunds, credits, or offsets of state and local income taxes (1040 line 10)	9999999999.
5	Alimony received (1040 line 11)	9999999999.
6	Business income or (loss) (1040 line 12)	9999999999.
7	Capital gain or (loss) (1040 line 13, 1040A line 10)	9999999999.
8	Other gains or (losses) (1040 line 14)	9999999999.
9	IRA distributions - taxable amount (1040 line 15b, 1040A line 11b)	9999999999.
10	Pensions and annuities - taxable amount (1040 line 16b, 1040A line 12b)	9999999999.
11	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (1040 line 17)	9999999999.
12	Farm income or (loss) (1040 line 18)	9999999999.
13	Unemployment compensation (1040 line 19, 1040A line 13, 1040EZ line 3)	9999999999.
14	Social Security benefits - taxable amount (1040 line 20b, 1040A line 14b)	9999999999.
15	Other income (1040 line 21)	9999999999.
16	Additions to income from TC-40A, Part 1 (Utah portion only in Utah column)	9999999999.
17 Total income - add lines 1 through 16 for both columns A and B		9999999999.
<b>Adjustments</b>		<b>Col. A - UTAH</b>
		<b>Col. B - TOTAL</b>
18	Educator expenses - (1040 line 23, 1040A line 16)	9999999999.
19	Certain business expenses (1040 line 24)	9999999999.
20	Health savings account deduction (1040 line 25)	9999999999.
21	Moving expenses (1040 line 26; enter in col. A only expenses moving into Utah)	9999999999.
22	One-half of self-employment tax (1040 line 27)	9999999999.
23	Self-employed SEP, SIMPLE and qualified plans (1040 line 28)	9999999999.
24	Self-employed health insurance deduction (1040 line 29)	9999999999.
25	Penalty on early withdrawal of savings (1040 line 30)	9999999999.
26	Alimony paid (1040 line 31a)	9999999999.
27	IRA deduction (1040 line 32, 1040A line 17)	9999999999.
28	Student loan interest deduction (1040 line 33, 1040A line 18)	9999999999.
29	Tuition and fees - (1040 line 34, 1040A line 19)	9999999999.
30	Domestic production activities deduction (1040 line 35)	9999999999.
31	State tax refund included on federal form 1040, line 10	9999999999.
32	Subtractions from income from TC-40A, Part 2 (Utah portion only in Utah column)	9999999999.
33 Total adjustments - add lines 18 through 32 for both columns A and B		9999999999.
34 Subtract line 33 from line 17 for both columns A and B (not less than zero)		9999999999.
Line 34, column B must equal TC-40, line 9		
<b>Non or Part-year Resident Utah Tax</b>		
35	Divide line 34 column A by line 34 column B (to 4 decimal places). Do not enter a number greater than 1.0000.	35 9.9999
36	Enter tax amount from TC-40, line 24	36 9999999999.
37	Multiply line 36 by the decimal on line 35. This is your Utah tax. Enter on TC-40, page 2, line 25	37 9999999999.
Submit this page ONLY if data entered.		
Attach completed schedule to your 2011 Utah Income Tax return		

Retirement Tax Credit Schedule												TC-40C											
40106												2011											
SSN 999-99-9999																							
Part 1 - Taxpayer Information																							
You												Spouse											
1 Date of birth - if born after 1952, you do not qualify for credit												• 99/99/99 • 99/99/99											
mm dd yy												mm dd yy											
Part 2 - Age 65 or Over - Credit																							
2 Enter "X" if you were age 65 or older by December 31, 2011												X X											
3 Enter total number of X's on line 2												9											
4 Multiply the number on line 3 by \$450												9999999999											
Part 3 - Under Age 65 - Retirement Income Credit																							
5 Enter "X" if you were under age 65 and born before January 1, 1953												X X											
6 If you entered an "X" on line 5, enter \$288 in the same column												9999999999											
7 Enter total qualified retirement income for taxpayer checked on line 5												9999999999											
8 Multiply the amount on line 7 for each column by 6% (.06)												9999999999											
9 Enter the lesser of line 6 or line 8 for each column												9999999999											
10 Enter the total of line 9 for both columns												9999999999											
Part 4 - Calculation of Credit																							
11 Add lines 4 and 10												9999999999											
12 Enter total income from your TC-40, line 6												9999999999											
13 Enter nontaxable interest income (form 1040 or 1040A, line 8b) (see instr.)												9999999999											
14 Modified adjusted gross income (add lines 12 and 13)												9999999999											
15 Enter: \$16,000, if married filing separately												9999999999											
\$25,000 if single												9999999999											
\$32,000 if married filing jointly or qualifying widow(er)																							
\$32,000 if head of household																							
16 Subtract line 15 from line 14 (not less than zero)												9999999999											
17 Multiply line 16 by 2.5% (.025)												9999999999											
18 Retirement Credit - subtract line 17 from line 11 (not less than zero)												9999999999											
Enter this amount on TC-40A, Part 3, using code 18																							
Submit this page ONLY if data entered.																							
Attach completed schedule to your 2011 Utah Income Tax return																							

6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80						
4	<b>Credit for Income Taxes Paid to Another State</b>																																																												<b>TC-40S</b>																			
5	<b>40107</b>																																																												<b>2011</b>																			
6																																																																																
7																																																																																
8	<b>FIRST STATE</b>																																																																															
9	1	Enter federal adjusted gross income taxed by both Utah and state of >																																								XX	9999999999.																																					
10																																																																																
11	2	Federal adjusted gross income from TC-40, line 4																																								9999999999.																																						
12																																																																																
13	3	Divide line 1 by line 2; round to 4 decimal places. Do not enter a number greater than 1.0000.																																								9.9999																																						
14																																																																																
15	4	Utah income tax from TC-40, line 22. Part-year residents, see instructions.																																								9999999999.																																						
16																																																																																
17	5	Credit limitation - multiply line 4 by decimal on line 3																																								9999999999.																																						
18																																																																																
19	6	Actual income tax paid to state shown on line 1.																																								9999999999.																																						
20	Part-year residents must prorate tax paid to other state. Credit only applies																																																																															
21	to the portion of actual taxes paid to the other state on income shown on line 1.																																																																															
22																																																																																
23	7	Credit for tax paid another state - lesser of line 5 or line 6																																								9999999999.																																						
24																																																																																
25	<b>SECOND STATE</b>																																																																															
26	1	Enter federal adjusted gross income taxed by both Utah and state of >																																								XX	9999999999.																																					
27																																																																																
28	2	Federal adjusted gross income from TC-40, line 4																																								9999999999.																																						
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30	3	Divide line 1 by line 2; round to 4 decimal places. Do not enter a number greater than 1.0000.																																								9.9999																																						
31																																																																																
32	4	Utah income tax from TC-40, line 22. Part-year residents, see instructions.																																								9999999999.																																						
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34	5	Credit limitation - multiply line 4 by decimal on line 3																																								9999999999.																																						
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36	6	Actual income tax paid to state shown on line 1.																																								9999999999.																																						
37	Part-year residents must prorate tax paid to other state. Credit only applies																																																																															
38	to the portion of actual taxes paid to the other state on income shown on line 1.																																																																															
39																																																																																
40	7	Credit for tax paid another state - lesser of line 5 or line 6																																								9999999999.																																						
41																																																																																
42	<b>THIRD STATE</b>																																																																															
43	1	Enter federal adjusted gross income taxed by both Utah and state of >																																								XX	9999999999.																																					
44																																																																																
45	2	Federal adjusted gross income from TC-40, line 4																																								9999999999.																																						
46																																																																																
47	3	Divide line 1 by line 2; round to 4 decimal places. Do not enter a number greater than 1.0000.																																								9.9999																																						
48																																																																																
49	4	Utah income tax from TC-40, line 22. Part-year residents, see instructions.																																								9999999999.																																						
50																																																																																
51	5	Credit limitation - multiply line 4 by decimal on line 3																																								9999999999.																																						
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53	6	Actual income tax paid to state shown on line 1.																																								9999999999.																																						
54	Part-year residents must prorate tax paid to other state. Credit only applies																																																																															
55	to the portion of actual taxes paid to the other state on income shown on line 1.																																																																															
56																																																																																
57	7	Credit for tax paid another state - lesser of line 5 or line 6																																								9999999999.																																						
58																																																																																
59																																																																																
60	<b>Use additional forms TC-40S if claiming credits for more than three states</b>																																																																															
61	<b>Enter the total of all amounts shown on line 7 above on TC-40A, Part 4, using code 17</b>																																																																															
62	<b>Submit this page ONLY if data entered.</b>																																																																															
63	<b>Attach completed schedule to your 2011 Utah Income Tax return</b>																																																																															



Part 1 - Utah Withholding Tax Schedule				TC-40W				Page 1			
40108				SSN 999-99-9999				2011			
Line Explanations:				IMPORTANT							
1 Employer/payer ID number from W-2 box "b" or 1099				Do not send your W-2s or 1099s with your return. Instead, enter							
2 Utah withholding ID number from W-2 box "15" or 1099				W-2 or 1099 information below, but only if there is Utah withholding							
(14 characters, ending in WTH, no hyphens)				on the form.							
3 Employer/payer name and address from W-2 box "c" or 1099											
4 Enter "X" if reporting Utah withholding from form 1099				Use additional forms TC-40W if you have more than four W-2s and/or							
5 Employee's Social Security number from W-2 box "a" or 1099				1099s with Utah withholding tax.							
6 Utah wages or income from W-2 box "16" or 1099											
7 Utah withholding tax from W-2 box "17" or 1099				Enter mineral production withholding from TC-675R in Part 2 of TC-40W.							
				enter pass-through entity withholding in Part 3 of TC-40W.							
1 9999999999				1 9999999999							
2 XXXXXXXXXXXXXXXWTH < 14 characters, no hyphens				2 XXXXXXXXXXXXXXXWTH < 14 characters, no hyphens							
3 XX				3 XX							
4 X				4 X							
5 9999999999				5 9999999999							
6 9999999999.				6 9999999999.							
7 9999999999.				7 9999999999.							
1 9999999999				1 9999999999							
2 XXXXXXXXXXXXXXXWTH < 14 characters, no hyphens				2 XXXXXXXXXXXXXXXWTH < 14 characters, no hyphens							
3 XX				3 XX							
4 X				4 X							
5 9999999999				5 9999999999							
6 9999999999.				6 9999999999.							
7 9999999999.				7 9999999999.							
Enter total Utah withholding tax from all lines 7 here and on TC-40, page 2, line 33				9999999999.							
Submit this page ONLY if data entered.											
Attach this form to your 2011 Utah Income Tax Return. Do not attach W-2s or 1099s to your Utah return.											

6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80								
4	<b>Mineral Production and Pass-through Withholding</b>																																	<b>TC-40W</b>										Page 2																																						
5	40109		SSN		999-99-9999										<b>2011</b>																																																																			
6																																																																																		
7	<b>Part 2 - Utah Mineral Production Withholding Tax - TC-675R</b>																																																																																	
8	Do not send TC-675Rs or Utah Schedules K-1 with return. Enter TC-675R or Schedule K-1 information below. Use additional TC-40Ws if needed.																																																																																	
9																																																																																		
10	<b>Line Explanations:</b>																																																																																	
11	1		Producer's EIN from box "2" of TC-675R																																	4		Pass-through entity EIN if credit from partnership or S corporation																																												
12	2		Producer's name from box "1" of TC-675R																																			(enter EIN from Utah Schedule K-1)																																												
13	3		Producer's Utah withholding number from box "3" of TC-675R																																	5		Utah mineral production withholding tax from box "5" of TC-675R or																																												
14			(14 characters, ending in WMP, no hyphens)																																			from Utah Schedule K-1																																												
15																																																																																		
16	1		9999999999																																	1		9999999999																																												
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36																																																																																		
37																																																																																		
38	Enter total mineral production withholding tax from all lines 5 here and on TC-40, page 2, line 36.																																																												9999999999.																					
39																																																																																		
40	<b>Part 3 - Utah Pass-through Entity Taxpayer Withholding - Utah Schedule K-1</b>																																																																																	
41	Do not send Utah Schedule(s) K-1 with return. Enter information below. Use additional TC-40Ws if needed.																																																																																	
42																																																																																		
43	Line Explanations:		2		Name of pass-through entity from Utah Schedule K-1 box "B"																																																																													
44	1		Pass-through entity EIN from Utah Schedule K-1 box "A"																																	3		Utah withholding tax paid by pass-through entity																																												
45																																																																																		
46	1		9999999999																																	1		9999999999																																												
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59																																																																																		
60	Enter total pass-through withholding tax from all lines 3 here and on TC-40, page 2, line 35.																																																												9999999999.																					
61																																																																																		
62	Submit this page ONLY if data entered.																																																																																	
63	Attach this form to your 2011 Utah Income Tax Return. Do not attach withholding forms to your Utah return.																																																																																	